regoUniversity 2021
VIRTUAL
RegoLink & RegoXchange
Your Guides:
Eric Taylor and Josh Leone

Agenda

- Rego Innovation Overview
- RegoLink - Integrations
  - Overview
  - Samples
- Other Innovation Items
  - SQL Extractor
  - Action Item Responder
  - MSP Connector
  - Functional Modules
  - Excel Uploaders
- RegoXchange Clarity Content Library

Overview of Rego Innovation

- Rego Goals:
  1. Reduce the Cost to Implement & Support a PPM tool
  2. Add new functionality that is not part of the core tool

- All solutions use OOTB capabilities – no customizations

- No ongoing maintenance costs – free upgrades forever, except where we have some ongoing costs – then move to subscription

RegoLink – Integrations and Innovation

regoUniversity 2021
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Let Rego be your guide.

ITSM	Intake and Collaboration	Applications	Vendor and Time Management	Project and Resource Management
servicenow	salesforce	SharePoint	SAP Fieldglass	Project
cherwell	Excel	Troux Insight	Beeline	smartsheet
Appian	servicenow		KRONOS	SharePoint
bmc Remedy	Microsoft Teams		ADP	MEISTERPLAN
	HubSpot			Outlook
	slack			itdesign ARP
	Microsoft Flow			

Wagile Board

Action Item Responder

Enhanced MSP Integration

regoLink

Innovation and integrations for Clarity

SQL Data Extractor

Channel Pack

Roadmap Printer

Agile Integrations

servicenow

JIRA

COLLABNET VERSIONONE

Visual Studio Team Foundation Server

RALLY Agile Central

HR/Resource/Financial

ORACLE

JDEdwards Enterprise Software

NETSUITE

servicenow

LAWSON

ADP

workday.

PeopleSoft

sage

Microsoft Azure

SAP

APPTIO

Reporting and Business Intelligence

Power BI

JASPERSOFT

+ableau

Azure Data lake

Spotfire

QlikView

RegoXchange

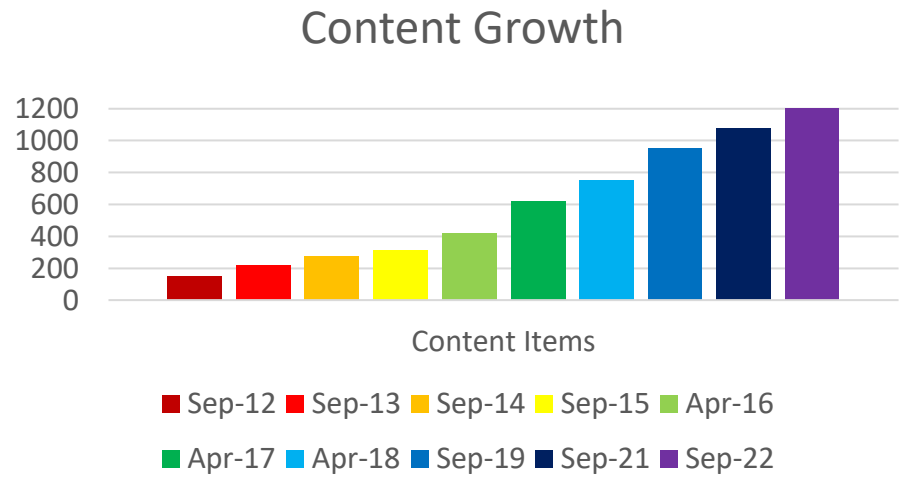
Let Rego be your guide.

RegoXchange - Reuse of Existing Solutions

- www.regoxchange.com
- Revolutionary knowledge-sharing application – a “co-op” or Shareware site containing hundreds of ready-to-use solutions including portlets, reports, processes, training material, etc.
- Populated with content that Rego has built over the past 14 years
- Library constantly grows (at least 1 new content item added every week)
- Low annual subscription fee will provide unlimited access to the entire RegoXchange library (1,200+ solutions)

regoXchange: Quick Overview

- The regoXchange went live 9 years ago and started with about 150 content items



- The user base consists of more than 3200 individuals representing more than 1000 companies
- There are two content libraries, theBasiX (2/3 free content), and theWorX (1/3 available with subscription)

Finding Content

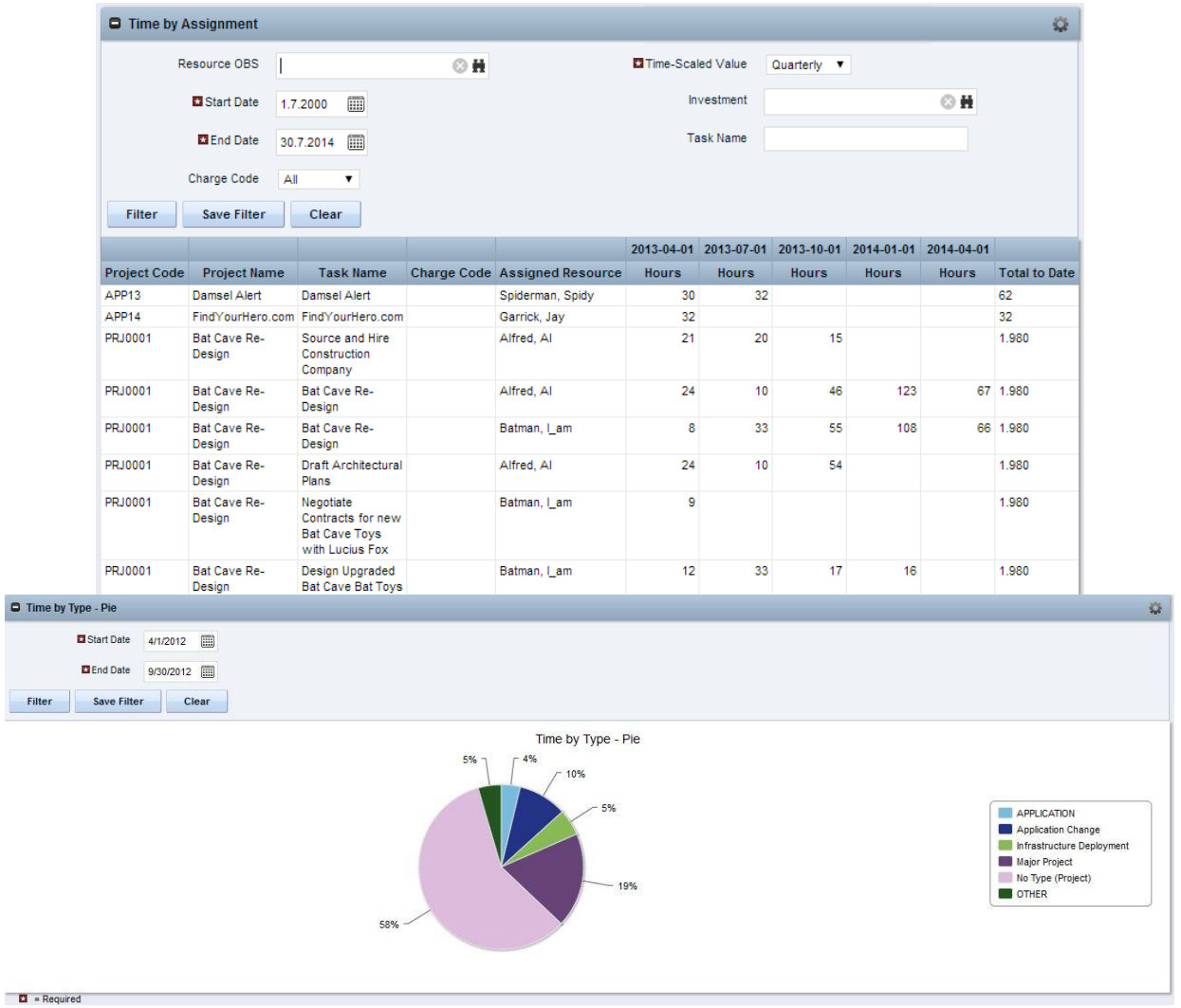
- Let’s quickly review the easiest ways to find content on the site

Content Highlights

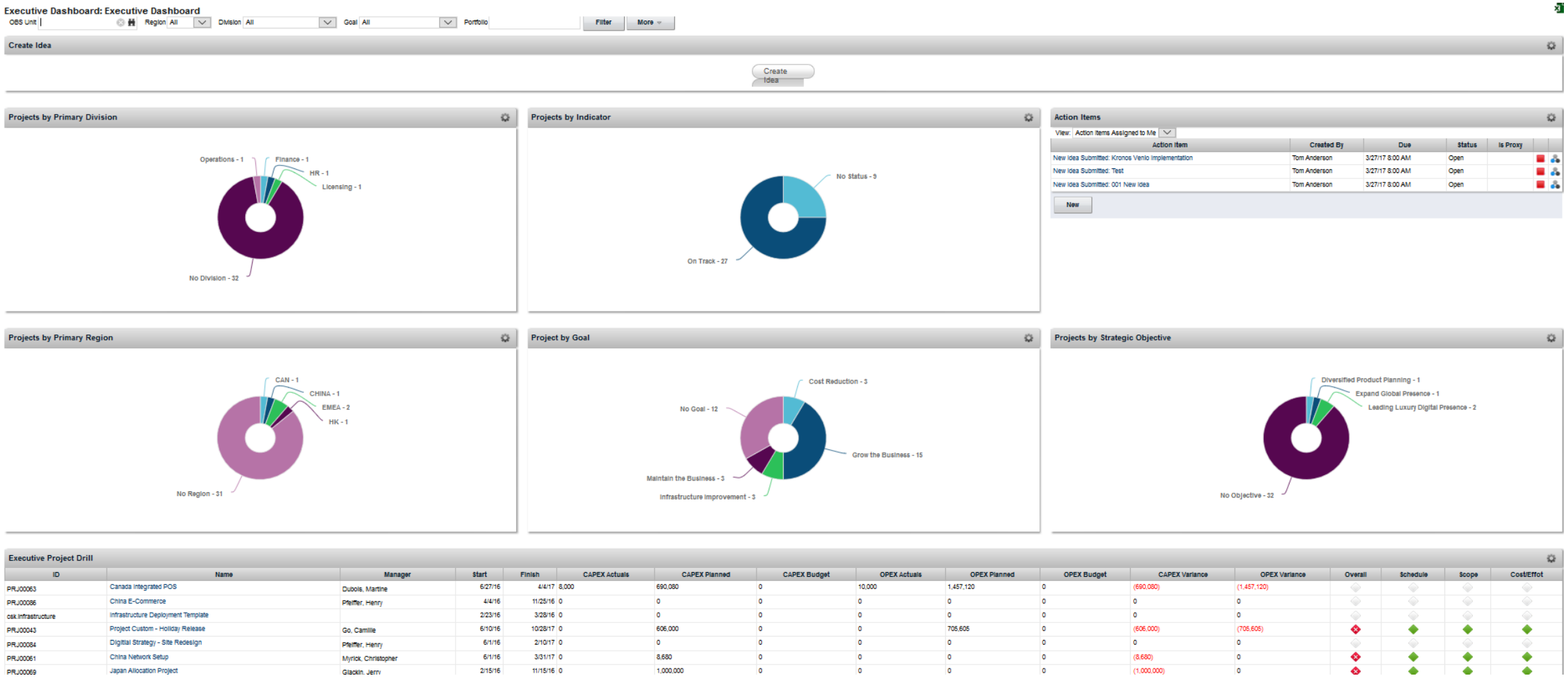
Portlets: Examples 2 of 200+

Portlets: Time by…

- Time by Assignment
- Time by Investment
- Time by Resource
- Time by Resource and Investment
- Time by Stage and Timescale
- Time by Task
- Time by Task Stage
- Time by Type – Pie Chart

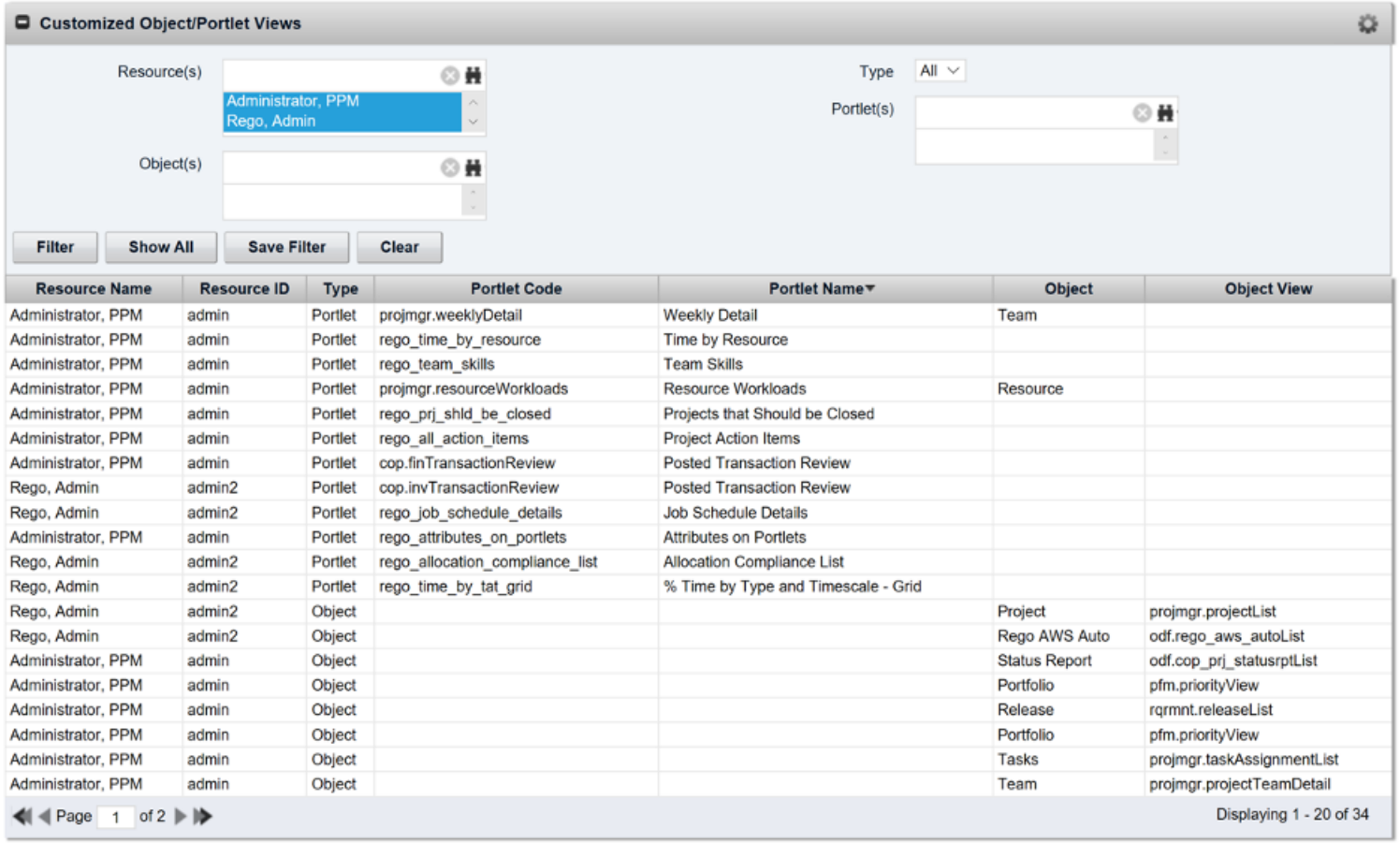


Portlets: Executive Drill Down Portlets



New Portlets – 2020/21

- Resource with OBS Rights
- Show OBS by IDs
- User Activity
- Users with Customized Object/Portlet Views



Customized Object/Portlet Views

Resource(s): Administrator, PPM; Rego, Admin

Type: All

Portlet(s)

Object(s)

Filter | Show All | Save Filter | Clear

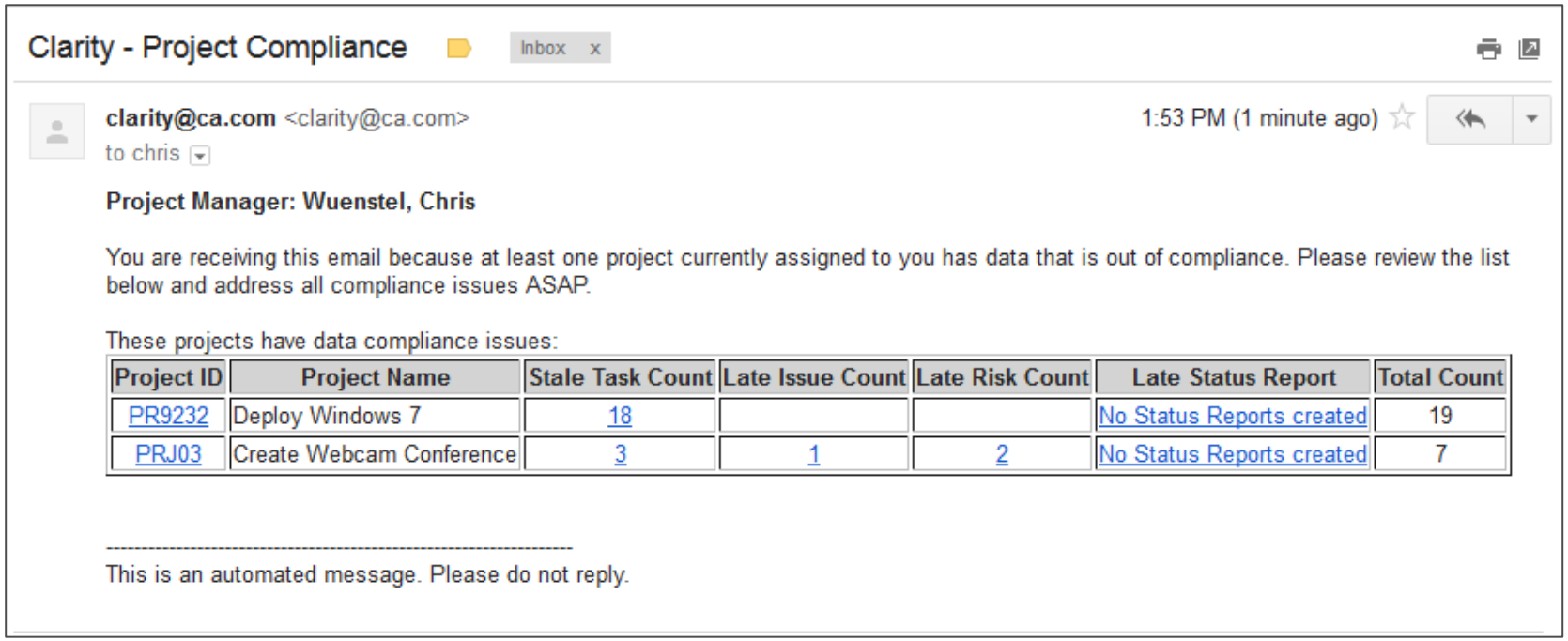
Resource Name	Resource ID	Type	Portlet Code	Portlet Name	Object	Object View
Administrator, PPM	admin	Portlet	projmgr.weeklyDetail	Weekly Detail	Team	
Administrator, PPM	admin	Portlet	rego_time_by_resource	Time by Resource		
Administrator, PPM	admin	Portlet	rego_team_skills	Team Skills		
Administrator, PPM	admin	Portlet	projmgr.resourceWorkloads	Resource Workloads	Resource	
Administrator, PPM	admin	Portlet	rego_prj_shld_be_closed	Projects that Should be Closed		
Administrator, PPM	admin	Portlet	rego_all_action_items	Project Action Items		
Administrator, PPM	admin	Portlet	cop.finTransactionReview	Posted Transaction Review		
Rego, Admin	admin2	Portlet	cop.invTransactionReview	Posted Transaction Review		
Rego, Admin	admin2	Portlet	rego_job_schedule_details	Job Schedule Details		
Administrator, PPM	admin	Portlet	rego_attributes_on_portlets	Attributes on Portlets		
Rego, Admin	admin2	Portlet	rego_allocation_compliance_list	Allocation Compliance List		
Rego, Admin	admin2	Portlet	rego_time_by_tat_grid	% Time by Type and Timescale - Grid		
Rego, Admin	admin2	Object			Project	projmgr.projectList
Rego, Admin	admin2	Object			Rego AWS Auto	odf.rego_aws_autoList
Administrator, PPM	admin	Object			Status Report	odf.cop_prj_statusrptList
Administrator, PPM	admin	Object			Portfolio	pfm.priorityView
Administrator, PPM	admin	Object			Release	rqrmnt.releaseList
Administrator, PPM	admin	Object			Portfolio	pfm.priorityView
Administrator, PPM	admin	Object			Tasks	projmgr.taskAssignmentList
Administrator, PPM	admin	Object			Team	projmgr.projectTeamDetail

Page 1 of 2 — Displaying 1 - 20 of 34

Content Highlights

Workflow Processes: Examples 4 of 65+

Workflows: Project Compliance Stalker - PM



Clarity - Project Compliance

Inbox x

clarity@ca.com <clarity@ca.com>

to chris

1:53 PM (1 minute ago)

Project Manager: Wuenstel, Chris

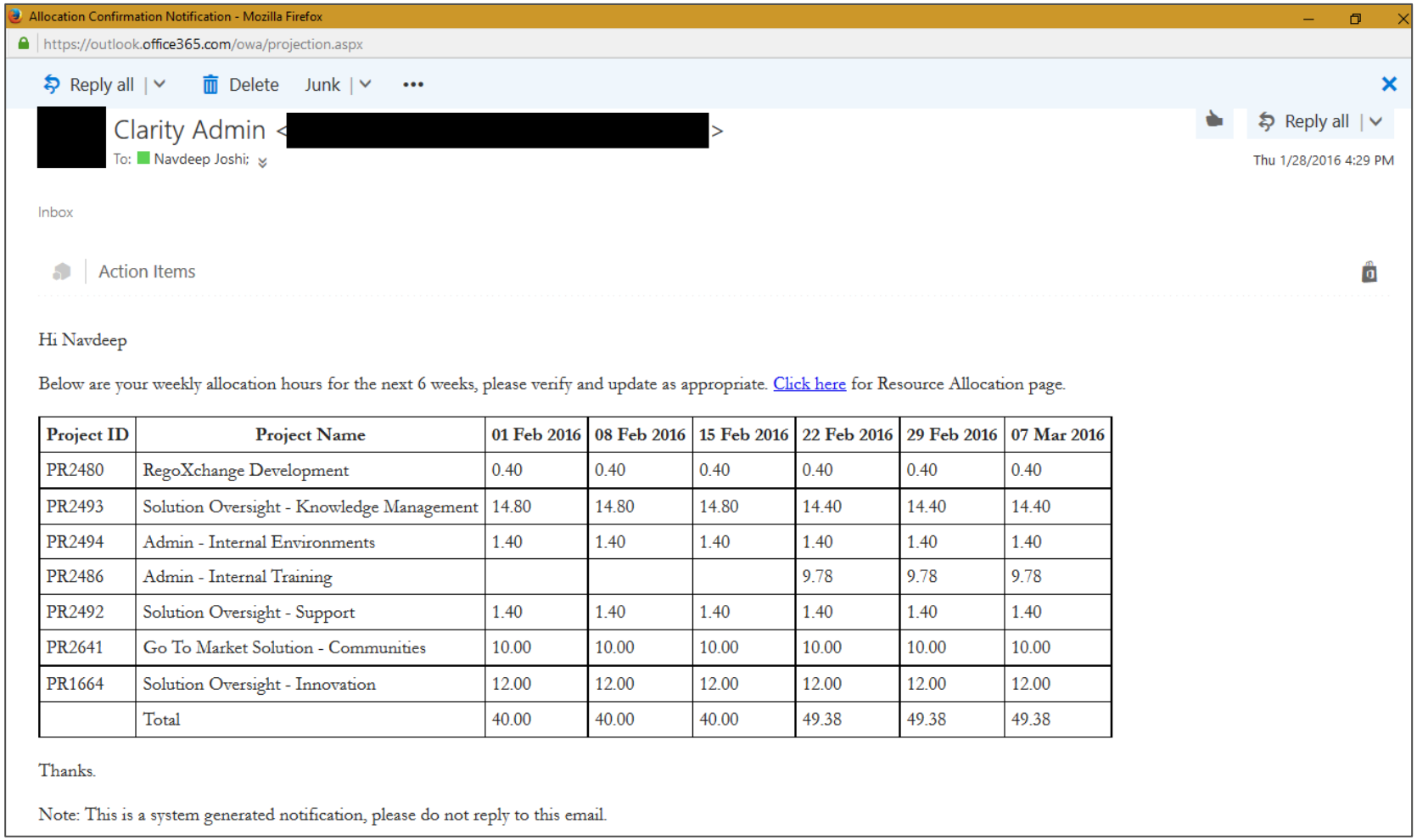
You are receiving this email because at least one project currently assigned to you has data that is out of compliance. Please review the list below and address all compliance issues ASAP.

These projects have data compliance issues:

Project ID	Project Name	Stale Task Count	Late Issue Count	Late Risk Count	Late Status Report	Total Count
PR9232	Deploy Windows 7	18			No Status Reports created	19
PRJ03	Create Webcam Conference	3	1	2	No Status Reports created	7

This is an automated message. Please do not reply.

Workflows: Allocation Confirmation Notification



Project ID	Project Name	01 Feb 2016	08 Feb 2016	15 Feb 2016	22 Feb 2016	29 Feb 2016	07 Mar 2016
PR2480	RegoXchange Development	0.40	0.40	0.40	0.40	0.40	0.40
PR2493	Solution Oversight - Knowledge Management	14.80	14.80	14.80	14.40	14.40	14.40
PR2494	Admin - Internal Environments	1.40	1.40	1.40	1.40	1.40	1.40
PR2486	Admin - Internal Training				9.78	9.78	9.78
PR2492	Solution Oversight - Support	1.40	1.40	1.40	1.40	1.40	1.40
PR2641	Go To Market Solution - Communities	10.00	10.00	10.00	10.00	10.00	10.00
PR1664	Solution Oversight - Innovation	12.00	12.00	12.00	12.00	12.00	12.00
	Total	40.00	40.00	40.00	49.38	49.38	49.38

Workflows: Time Validation to PMs

[redacted]

Mon 7/24/2017 7:00 PM

[redacted]

Cerner - Deployment to IP and Consulting: PLEASE REVIEW time tracked last week

To Daniel Greer

You are receiving this email because you have at least one person who tracked time to this project last week. PLEASE review this time and validate that the time was spent on your project. If you disagree with the time, please contact the resource.

Here is the detail:

Resource	Task	Hours
Chouhan, Vipin	INT: Cons Get PNs R1	2.0
Chouhan, Vipin	INT: Proj Roles	4.0
Garvey, Sara	CONR1: Training Materials (PPT, 15 Videos, 4 QRG)	4.0
Gillespie, Mike	Gov: Project/Account Management (6 hrs/week)	10.0
Greer, Daniel	Gov: Project/Account Management (6 hrs/week)	5.0
Karunakaran, Nadarajah	CONR1: Configuration Items (Portlet/WF/Objects/Security)	0.5
Meyers, Michael	CONR1: Training Materials (PPT, 15 Videos, 4 QRG)	4.5
Renapure, Yogesh	Gov: Project/Account Management (6 hrs/week)	2.5
Rinella, Jenn	Con R2: MSP Support and Testing	0.5
Schmenk, Ann	CONR1: Training Materials (PPT, 15 Videos, 4 QRG)	0.5

Workflows: Weekly PM Reminder

Project Manager :: Weekly Email Reminder

S

sayantan.gupta@regoconsulting.com <regodevsys@gmail.com>
Sayantan Gupta
Tuesday, October 17, 2017 at 8:49 AM
Show Details

Dear Chris Wuenstel,

Below are the consolidated reminders:

Past Due Issues:				
Project		**Target Date**	**Priority**	**Flag**
PRJ0185 - Admin - Technical Environment Training Admin - Technical Environmvery long text	i1	17-SEP-2015	Low	Red
PRJ0012 - Create Secret Identity	Manager Hates Me	17-APR-2013	Low	Red
Past Due Risks				
PRJ0185 - Admin - Technical Environment Training Admin - Technical Environmvery long text	r1	17-SEP-2015	Medium	Red
PRJ0012 - Create Secret Identity	Lose Powers	05-DEC-2013	Low	Red
PRJ0012 - Create Secret Identity	Somebody Knows Who I Am	05-DEC-2013	High	Red
PRJ0012 - Create Secret Identity	Lose Job	17-APR-2013	High	Red

Past Due Status Report:

Project	Status Report	Most Recent	Overall Status	Flag
PRJ0012 - Create Secret Identity	Status on 5/24	24-MAY-2013	Critical	Red
PRJ0076 - Another Sharepoint Test	test	02-SEP-2014		Red
PRJ0185 - Admin - Technical Environment Training Admin - Technical Environmvery long text	Status 0001	15-SEP-2015		Red
PRJ0034 - JD - Test Project				Red
PRJ0135 - Milestone Type Test				Red
PRJ0075 - Sharepoint Project Test				Red

New Workflows – 20/21

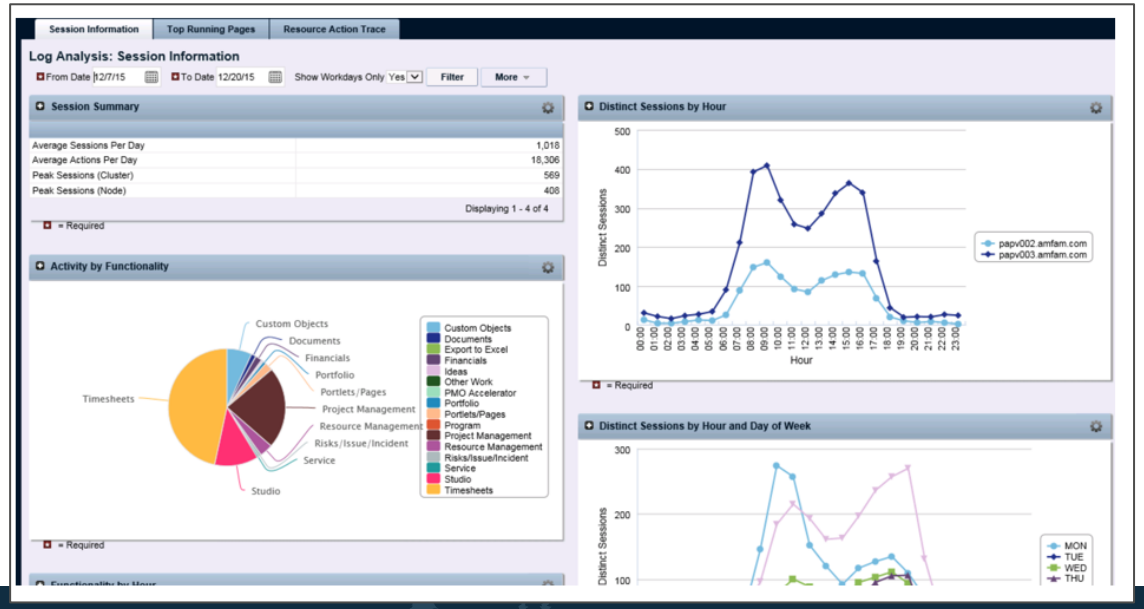
- Blueprint Migrator - Workflow process designed to migrate Blueprints from one environment to another. Can move multiple Blueprints at a time.
- Roadmap Cloning - process creates a clone copy of any existing roadmap
- Copy Documents – process moves documents from one place to another. For example, from an existing risk to a newly created risk.
- PrLock Clear for Timesheet Locks - The process is built to clear the random timesheet locks that happens occasionally. There are three Processes and one lookup component in the package.

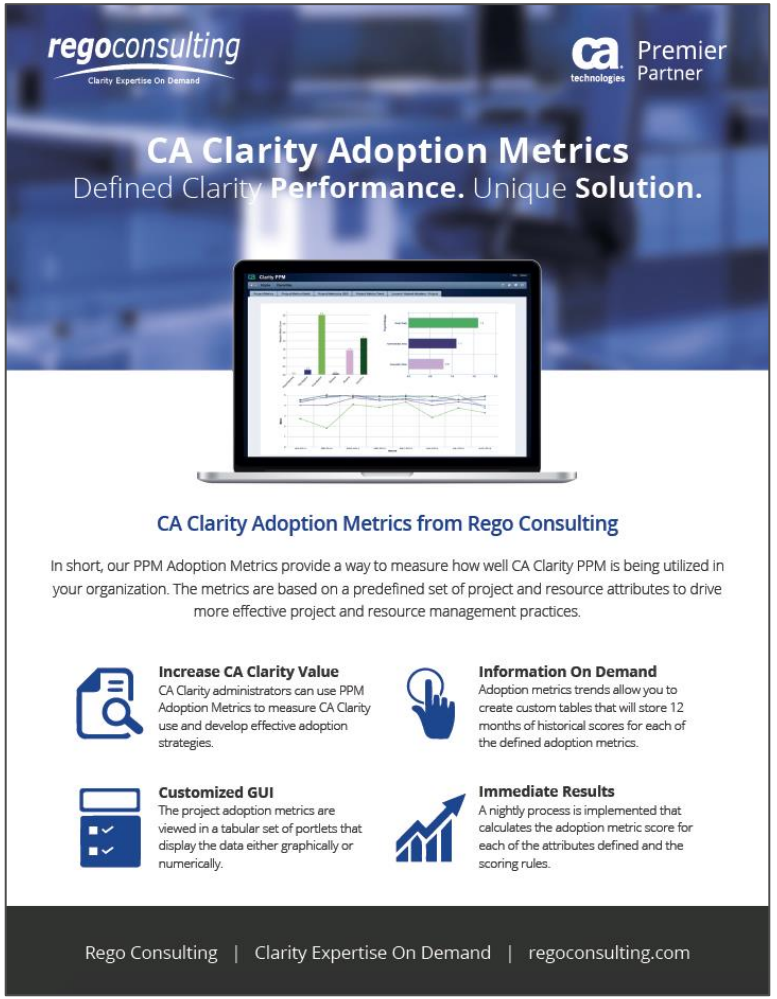
Content Highlights

Xchange+

Modules

- Business Transformation
- Performance Monitoring
- Adoption Metrics
- Contract Management
- Estimation





Content Highlights

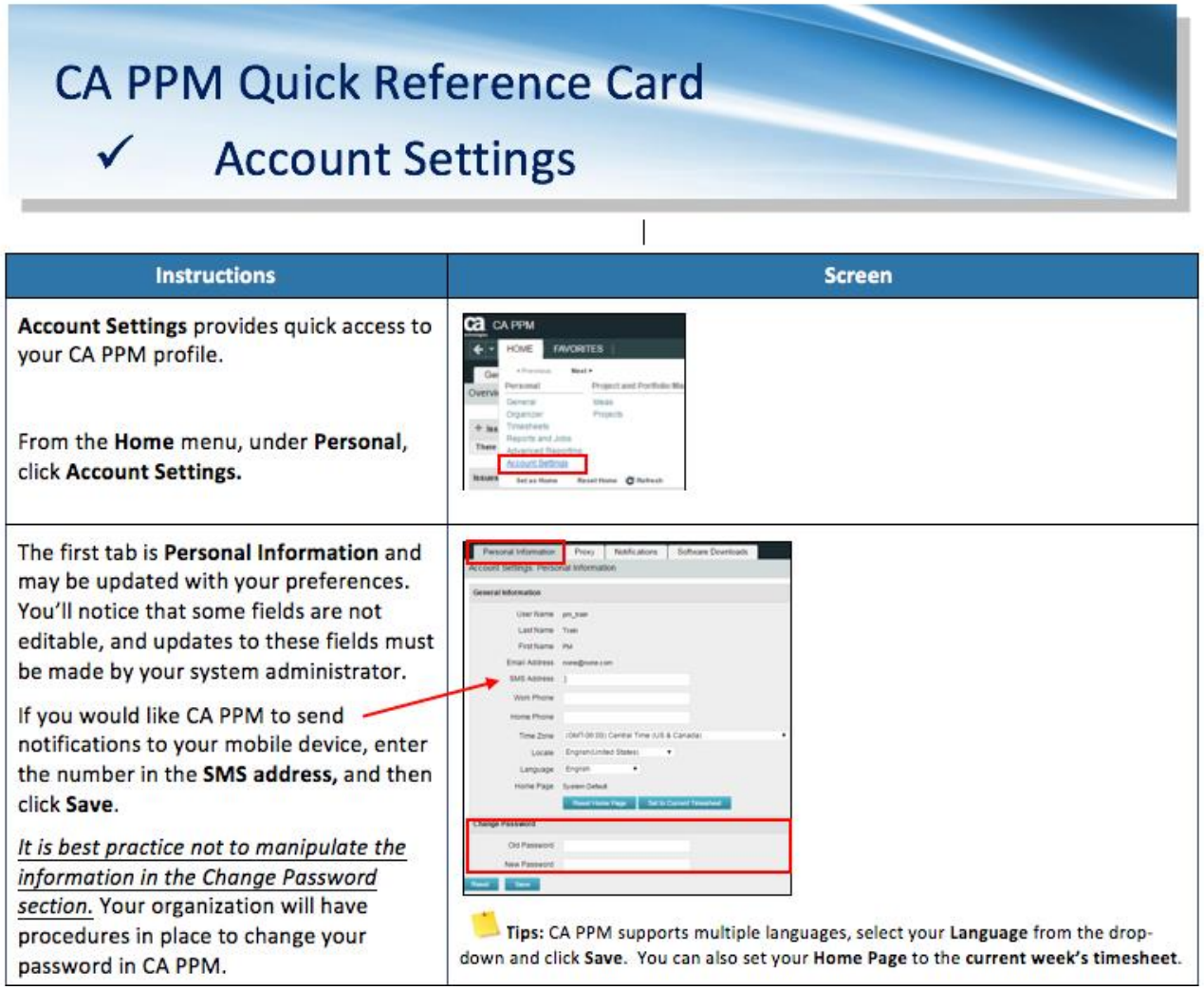
Training: Documents and Videos (300+ Files)

Rego Base Training

- Advanced Clarity Administration
- Advanced Data Model Training
- Crystal Reports Development
- Intro to Clarity Application Administration
- Introduction to Clarity Financials
- Introduction to Clarity Open Workbench
- Jaspersoft Development
- Managing Portfolios with Clarity
- Managing Projects with Clarity
- Managing Resources with Clarity
- Using Jaspersoft with Clarity

Quick Reference Cards

- Clarity Basics – 22
- Demand Management – 7
- Financial Management – 4
- Portfolio Management - 5
- Program Management – 3
- Project Management – 42
- Resource Management – 12
- Time Management – 7
- Modern UX Specific – 60+



CA PPM Quick Reference Card

✓ Account Settings

Instructions	Screen
Account Settings provides quick access to your CA PPM profile. From the **Home** menu, under **Personal**, click **Account Settings.**	
The first tab is **Personal Information** and may be updated with your preferences. You'll notice that some fields are not editable, and updates to these fields must be made by your system administrator. If you would like CA PPM to send notifications to your mobile device, enter the number in the **SMS address,** and then click **Save**. *It is best practice not to manipulate the information in the Change Password section.* Your organization will have procedures in place to change your password in CA PPM.	**Tips:** CA PPM supports multiple languages, select your **Language** from the drop-down and click **Save**. You can also set your **Home Page** to the **current week's timesheet.**

Modern UX Training Content

- We recently released over 100 new training documents, many of which are related to the Modern UX, v15.9+
  - Time Entry and Approval – 5 docs
  - Roadmaps – 5 docs
  - Resource Management – 10 docs
  - Project Management – 15 docs
  - Portfolio Management – 5 docs
  - Navigation – 7 docs
  - Financials – 9 docs
  - Demand Management / Ideation – 6 docs
  - Blueprints – 6 docs
  - New Jaspersoft Training – 9 docs
  - Hierarchies, Custom Investments and more – 25 docs

Content Highlights

Jasper and PowerBI Reports

PowerBI Dashboards

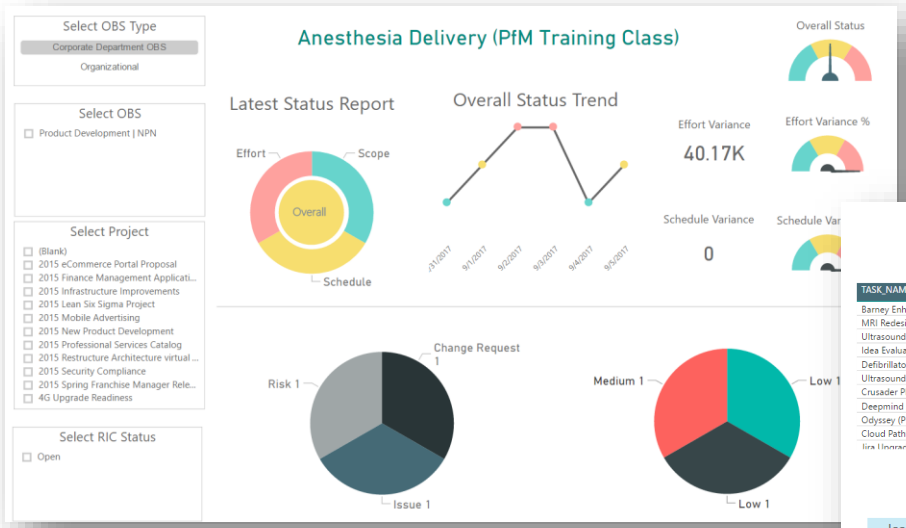
Reports

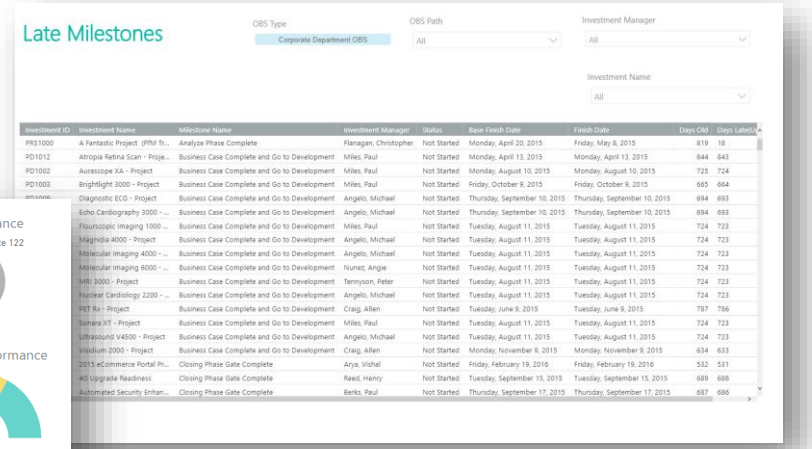
Reporting options for both Jasper and PowerBI – Most popular

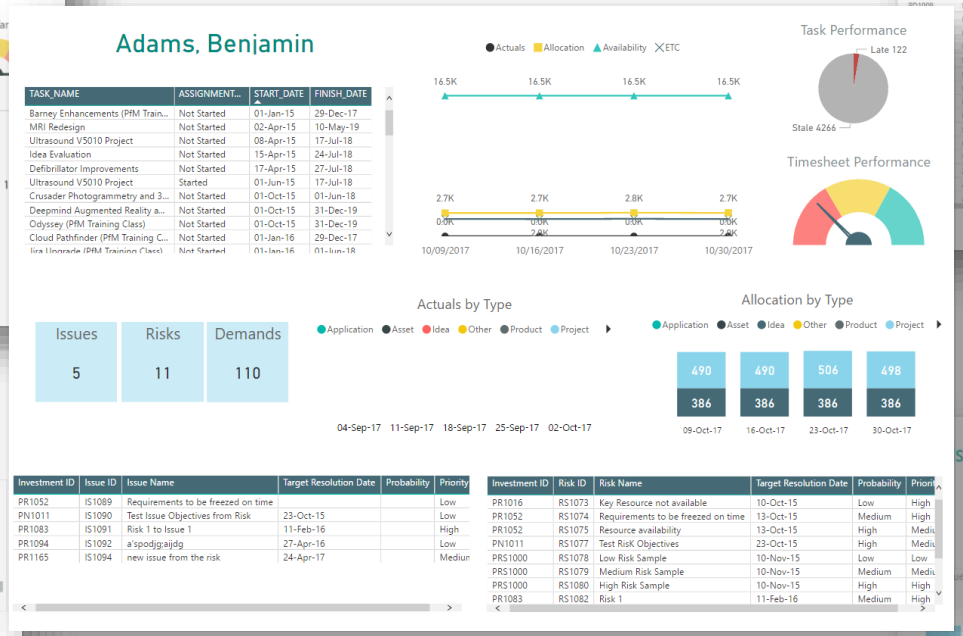
- Project Count by Stage (JS/PBI)
- Projects by Status Indicator - Pie (JS)
- Projects within Baseline Finish (JS)
- Project Budget vs Planned vs Actual by Mon. (JS/PBI)
- All Issues (JS/PBI)
- All Tasks (JS/PBI)
- All Assignments (JS/PBI)
- Time by Investment (JS)
- Project Status and Costs (JS/PBI)
- Data Issues - Projects (JS)
- Capacity Graph (JS/PBI)
- Project Time Summary (JS/PBI)
- Assignment by Task Over Time (JS)
- Project Cost Within Budget (JS/PBI)
- Projects by Stage and Manager (JS/PBI)
- Allocation Compliance by Mon. Pie Chart (JS/PBI)
- Allocation Compliance by Mon. Area Chart (JS)
- Time by Stage and Timescale – Graph (JS)
- Time by Stage and Timescale – Grid (JS)
- Ideas by Stage (JS)
- Ideas by Priority – Pie (JS)
- Ideas by Department – Pie (JS)
- Ideas by Business Unit – Pie (JS)
- All Change Requests (JS/PBI)
- Late Tasks with Assignments (JS)
- All Risks (JS/PBI)
- Time by Task (JS)
- Time by Assignment (JS)
- Resource Availability - 4 Weeks (JS)
- Allocation Compliance for PM (JS/PBI)
- Allocation Compliance Pie Chart (JS)

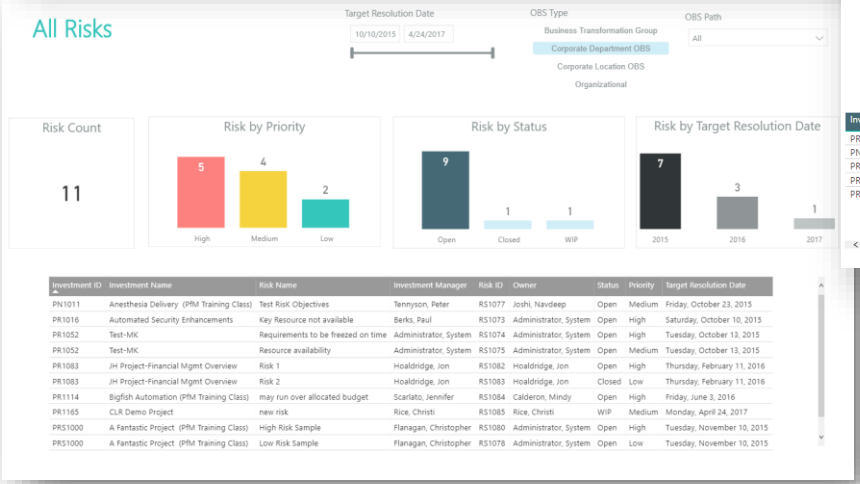
Over 40 PowerBi Reports!

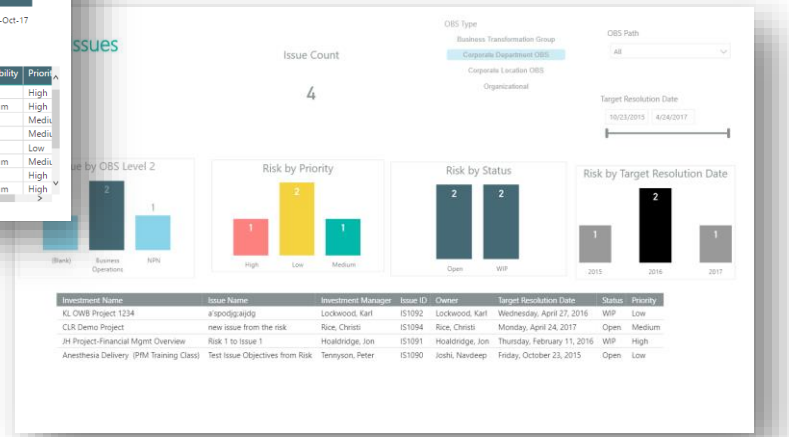
PowerBI Reports - Examples



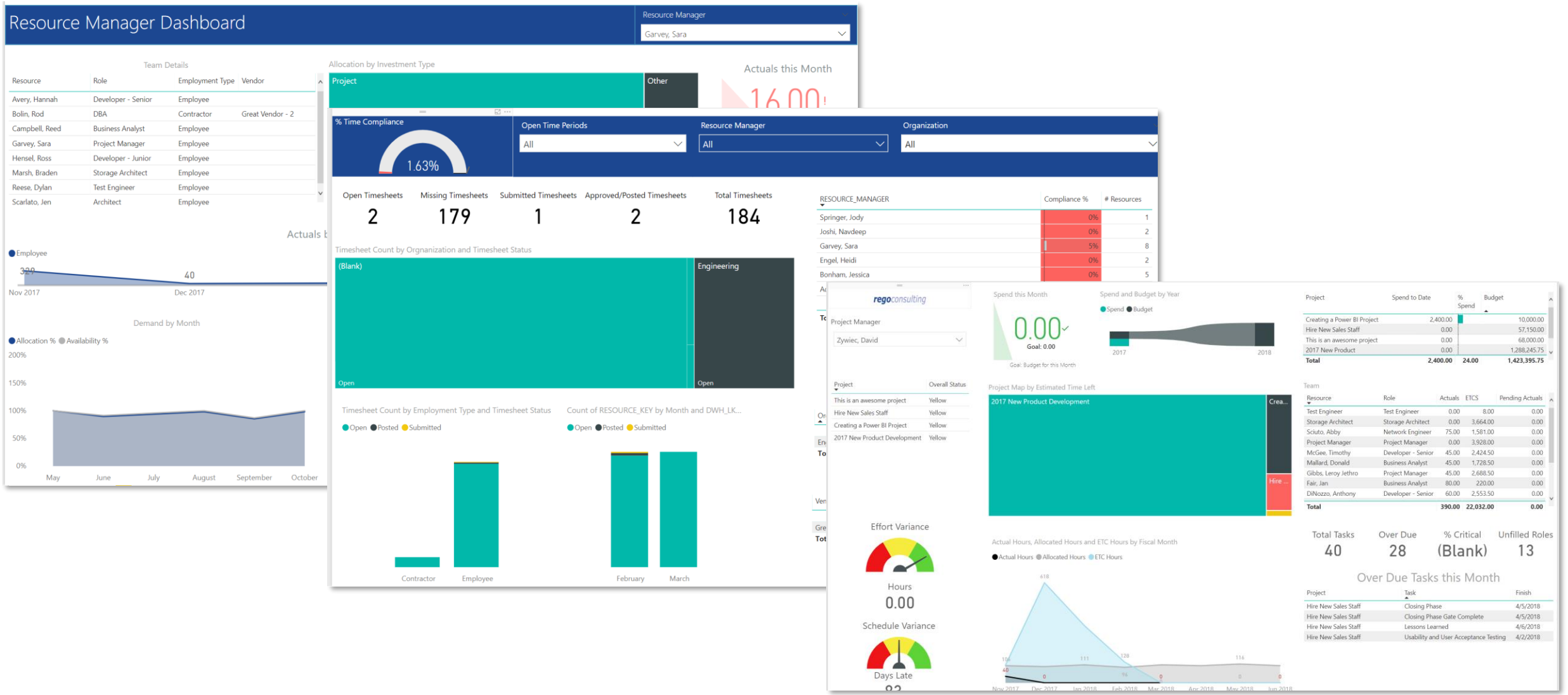








PowerBI Dashboards



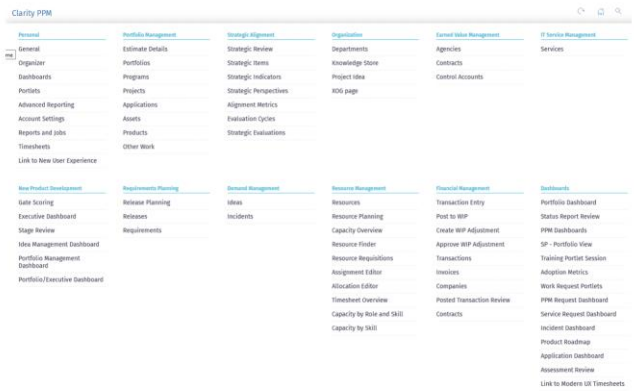
Recently Added Reports – 20/21

- Roadmap Grid Report
- A collection of OOTB JS report that hit the Transactional DB instead of the Data Warehouse.
  - Capacity vs Allocation by OBS
  - Capacity Demand by Resource
  - Missing Time
  - Over-Under Allocations by OBS
  - Project Status Summary
  - Project Storyboard
  - Timesheet Detail

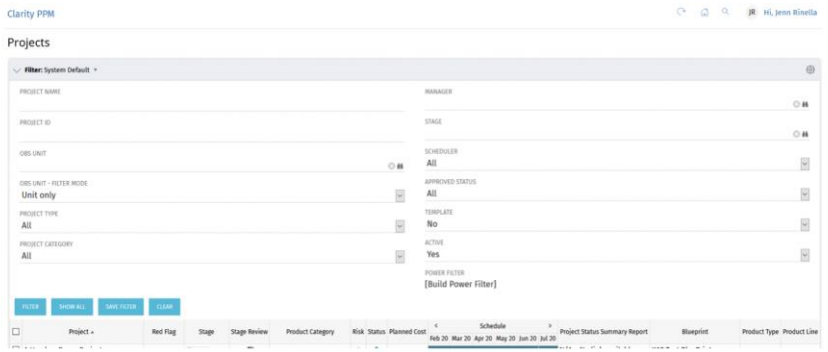
Rego's Version of the Phoenix UI

- We modified the OOTB Phoenix UI to clean it up and eliminate some of the dead space.

Out of the Box Phoenix UI Menu

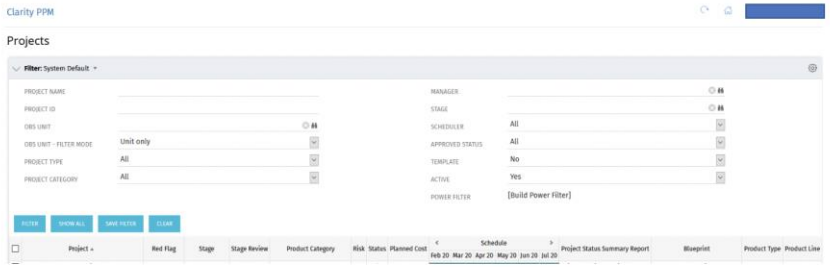


OOTB Phoenix UI – Project List Filter



Rego New Phoenix UI Menu

Rego New Phoenix UI - Project List Filter



Questions?

regoUniversity 2021
VIRTUAL

Let Rego be your guide.

Thank You For Attending regoUniversity

Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Name = **regoUniversity**
- Course Number = **Session Number**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**

Let us know how we can improve!
Don't forget to fill out the class survey.

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info@regouniversity.com

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